

## Position Description

Employment Agreement:	Individual Employment Agreement
Position Title:	<b>Analyst</b>
Service & Directorate:	Finance, Procurement and Facilities
Location:	Dunedin/Invercargill
Reports to:	Management Accountant
DHB Delegation Level:	N/A
Number of direct reports:	Nil
Date:	June 2017

### Our Vision

Better Health, Better Lives, Whānau Ora

We work in partnership with people and communities to achieve their optimum health and wellbeing  
We seek excellence through a culture of learning, enquiry, service and caring

### Our Shared Values and Behaviours

Kind <i>Manaakitanga</i>	Open <i>Pono</i>	Positive <i>Whaiwhakaaro</i>	Community <i>Whanaungatanga</i>
<b>Looking after our people:</b> We respect and support each other. Our hospitality and kindness foster better care.	<b>Being sincere:</b> We listen, hear and communicate openly and honestly. We treat people how they would like to be treated.	<b>Best action:</b> We are thoughtful, bring a positive attitude and are always looking to do things better.	<b>As family:</b> We are genuine, nurture and maintain relationships to promote and build on all the strengths in our community.

### Our statutory purpose

To improve, promote and protect the health of our population

- Promote the integration of health services across primary and secondary care services
- Seek the optimum arrangement for the most effective and efficient delivery of health services
- Promote effective care or support for those in need of personal health or disability support services
- Promote the inclusion and participation in society and the independence of people with disabilities
- Reduce health disparities by improving health outcomes for Māori and other population groups
- Foster community participation in health improvement and in planning for the provision of and changes to the provision of services
- Uphold the ethical and quality standards expected of use and to exhibit a sense of social and environmental responsibility

PURPOSE OF ROLE
To support the Management Accountant to ensure all business information is accurate and timely and to undertake monthly performance reviews with relevant Managers.
<p><b>Area/Role specific requirements:</b> Support the Management Accountant in the delivery of the following:</p> <ul style="list-style-type: none"> <li>Working with the finance team to ensure all business information is accurate and timely and undertake monthly performance reviews with relevant managers.</li> <li>Assist with the development of the annual and strategic plans, noting financial implications and opportunities to reduce costs.</li> <li>Evaluate business initiatives ensuring they are robustly challenged and improving value for money decision making.</li> <li>Provide organisational instructions, guidelines and timeframes for budgets.</li> <li>Facilitate the consolidation of monthly scorecards and reporting. Provide clarity on the financial impact of operational performance.</li> <li>Finance expert within the associated leadership team, driving and capturing operational efficiency and ensuring value for money on investments.</li> </ul>

## Competencies

The following competencies apply to this position. The employee will be assessed against these as part of their annual performance and development review.

Organisational Competencies	
<b>Customer Focus</b>	Is dedicated to meeting the expectations and requirements of internal and external customers; gets first hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.
<b>Integrity and Trust</b>	Is widely trusted; is seen as a direct, truthful individual; can present the unvarnished truth in an appropriate and helpful manner; keeps confidences; admits mistakes; doesn't misrepresent him/herself for personal gain.
<b>Drive For Results</b>	Can be counted on to exceed goals successfully; Is constantly and consistently one of the top performers; very bottom line oriented; steadfastly pushes self and others for results.
Role Specific Competencies	
<b>Problem Solving</b>	Uses rigorous logic and methods to solve difficult problems with effective solutions; probes all fruitful sources for answers; can see hidden problems; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers.
<b>Listening</b>	Practices attentive and active listening; has the patience to hear people out; can accurately restate the opinions of others even when he/she disagrees.
<b>Interpersonal Savvy</b>	Relates well to all kinds of people – up, down, and sideways, inside and outside the organisation; builds appropriate rapport; builds constructive and effective relationships; uses diplomacy and tact; can defuse even high-tension situations comfortably.
<b>Process Management</b>	Good at figuring out the processes necessary to get things done; knows how to organize people and activities; understands how to separate and combine tasks into efficient work flow; knows what to measure and how to measure it; can see opportunities for synergy and integration where others can't; can simplify complex processes; gets more out of fewer resources.
<b>Organisational Agility</b>	Knowledgeable about how organisations work; knows how to get things done both through formal channels and the informal network; understands the origin and reasoning behind key policies, practices, and procedures; understands the cultures of organisations.

KEY RELATIONSHIPS	
Within Southern DHB	External to Southern DHB
<ul style="list-style-type: none"> <li>Executive Director Finance, Procurement and Facilities</li> </ul>	

• Managers at all levels of the organisation	
• Management Accountant	
• Finance	

## PERSON SPECIFICATION

The expertise required for a person to be fully competent in the role. Position specific competencies:

	ESSENTIAL	DESIRABLE
<b>Education and Qualifications (or equivalent level of learning)</b>	<ul style="list-style-type: none"> <li>Bachelor's degree in accountancy and a minimum of 2 years business experience.</li> </ul>	
<b>Experience</b>	<ul style="list-style-type: none"> <li>Experience in performance monitoring, provider relationship and project management, preferably in a government or quasi government organisation.</li> <li>Proven ability to successfully facilitate and gain commitment to achieving a team effort.</li> <li>Demonstrated ability in operating pro-actively and with initiative and ensuring effective and efficient systems are in place that support the position's functions.</li> </ul>	
<b>Knowledge and Skills</b>	<ul style="list-style-type: none"> <li>Ability to analyse and plan across a broad range of functions, e.g. strategic, service, trend, financial, quantitative and qualitative matters.</li> <li>Advanced computer skills, particularly Microsoft Word and Excel.</li> <li>Knowledge of database management and accessing information from existing data sources.</li> <li>Confidence to accept responsibility and to act with authority and independence within delegated responsibilities.</li> <li>Ability to manage multiple projects and to work to strict deadlines.</li> <li>Knowledge of Quality Assurance and a commitment of continuous quality improvement.</li> </ul>	
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>Commitment and personal accountability.</li> <li>Excellent interpersonal skills, including ability to work effectively with people at all levels of the organisation.</li> <li>Acts with discretion, sensitivity and integrity at all times.</li> <li>Is adaptable and flexible – open to change (positive or negative).</li> <li>Maintains an exceptionally high level of confidentiality.</li> </ul>	

**KEY RESULT AREAS:**

Key Accountabilities:	Example of successful delivery of duties and responsibilities
<b>Support</b>	
<ul style="list-style-type: none"> <li>Supporting the Management Accountant to ensure all business information is accurate and timely and undertake monthly performance reviews with relevant manager/s.</li> <li>Ensure all forecasts and variance analysis reasonably correlate with actual business activities being reported.</li> <li>Review and agree FTE numbers and staffing ratios and develop financial policies and procedures, ensuring these are adhered to.</li> </ul>	<ul style="list-style-type: none"> <li>Financials are easily explained by what has happened operationally.</li> <li>No surprises in month end.</li> <li>Accurate Financial forecasts are aligned to operational performance.</li> <li>Recruitment stays within delegated authority.</li> </ul>
<b>Strategic &amp; Business Planning</b>	
<ul style="list-style-type: none"> <li>Assist the Management Accountant with the development of the annual and strategic plans, noting financial implications and opportunities to reduce costs.</li> <li>Development and on-going monitoring of KPIs.</li> <li>Provide robust longer term forecasts on a regular basis to ensure on-going viability and sustainability to avoid surprises.</li> <li>Develop and compile key business metrics and productivity measures and report to management.</li> <li>Financial and performance benchmarking – sector analysis to identify areas of potential operational improvement.</li> </ul>	<ul style="list-style-type: none"> <li>Financial forecasts/plans align to business requirements and also the strategic direction of the organisation.</li> </ul>
<b>Evaluation of Business Initiatives</b>	
<ul style="list-style-type: none"> <li>Undertake analysis to assist in the evaluation of business initiatives, ensuring they are robustly challenged and improving value for money decision making.</li> </ul>	<ul style="list-style-type: none"> <li>Analysis is accurate and provides relevant and timely information to allow a robust discussion with the Business Manager.</li> </ul>
<b>Budgeting</b>	
<ul style="list-style-type: none"> <li>Provide proactive support to the relevant manager/s during the budget process so that the financial and non-financial budgets are developed and agreed with the relevant leadership team.</li> </ul>	<ul style="list-style-type: none"> <li>Clear understanding of the budget and how it aligns to the operational performance of the area.</li> <li>No major movements on a monthly basis to plan unless operational changes have occurred.</li> </ul>
<b>Monitoring and Reporting</b>	
<ul style="list-style-type: none"> <li>Facilitate the consolidation of monthly scorecards and reporting.</li> <li>Provide clarity on the financial impact of operational performance.</li> </ul>	<ul style="list-style-type: none"> <li>Clear understanding of the budget and how it aligns to the operational performance of the area.</li> <li>No major movements on a monthly basis to plan unless operational changes have occurred.</li> </ul>
<b>Relationship Management</b>	
<ul style="list-style-type: none"> <li>Finance support within the associated management team, driving and capturing operational efficiency and ensuring Value for money on investments.</li> </ul>	<ul style="list-style-type: none"> <li>Positive feedback from relevant Business Managers.</li> </ul>

Other Duties	
Undertaking duties from time to time that may be in addition to those outlined above but which fall within your capabilities and experience.	<ul style="list-style-type: none"> <li>You respond positively to requests for assistance in own and other areas, demonstrating adaptability and willingness.</li> <li>You produce work that complies with SDHB processes and reflects best practice.</li> <li>Research undertaken is robust and well considered.</li> </ul>
Professional Development – self	
Identifying areas for personal and professional development.	<ul style="list-style-type: none"> <li>Training and development goals are identified/agreed with your manager.</li> <li>Performance objectives reviewed annually with your manager.</li> <li>You actively seek feedback and accept constructive criticism.</li> </ul>
Health, Safety and Wellbeing	
Taking all practicable steps to ensure personal safety and the safety of others while at work, in accordance with the Southern DHB's Health, Safety and Wellbeing policies, procedures and systems.	<ul style="list-style-type: none"> <li>You understand and consistently meet your obligations under Southern DHB's Health and Safety policy/procedures.</li> <li>You actively encourage and challenge your peers to work in a safe manner.</li> <li>Effort is made to strive for best practice in Health and Safety at all times.</li> </ul>
Treaty of Waitangi	
Giving effect to the principles of the Treaty of Waitangi – Partnership, Participation and Protection through your interaction with others on a day to day basis.	<ul style="list-style-type: none"> <li><i>Partnership</i> – You interact in good faith and in the nature of a partnership. There is a sense of shared enterprise and mutual benefit where each partner takes account of the needs and interests of the other.</li> <li><i>Participation</i> – You work in partnership with our treaty partners to enable our organisation to prosper. You are mindful of the varying socio-economic conditions that face our people and work hard to remove barriers of access to health and education.</li> <li><i>Protection</i> – You work proactively to protect the rights and interests of Māori, including the need to proactively build the capacity and capability of Māori.</li> </ul>

### CHANGES TO POSITION DESCRIPTION

From time to time it may be necessary to consider changes to the position description in response to the changing nature of our work environment – including technological requirements or statutory changes. This Position Description may be reviewed as part of the preparation for your annual performance and development review.

Acknowledged / Accepted:

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Employee

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Date

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Manager

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Date